



SHIPPING AND RECEIVING

The Shipping and Receiving functionality allows organizations to generate shipments of assets and stock items within their organization, receive items on shipments, and manage shipping exceptions. Shipments consist of one or multiple containers, each of which may contain identified assets or stock items. Sunflower provides users with the ability to generate shipping manifests as well as summary shipment reports. Additionally, organizational and personal parameter options are available to minimize data entry of common field values. Currently the Shipping and Receiving functionality is available for Inventory assets exclusively.

KEY CONCEPTS

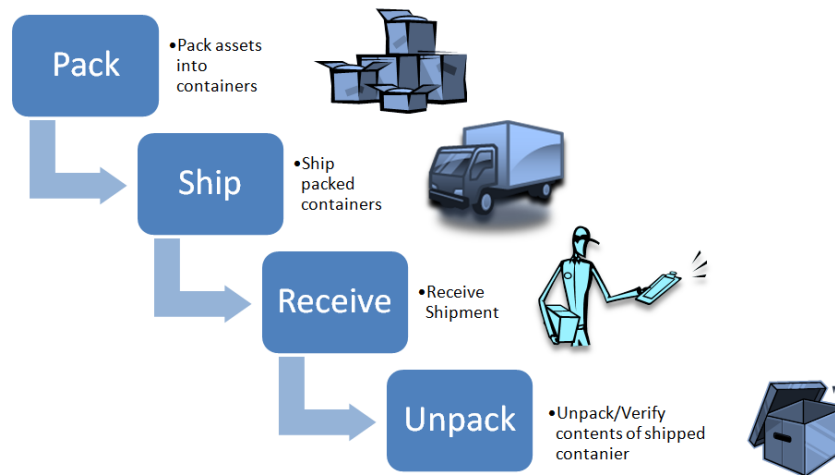
This chapter will include the following discussion points and concepts:

- About Shipping and Receiving
- Creating Shipments and Containers
- Receiving Shipments and Containers
- Managing Shipping Exceptions
- Viewing Shipment Summary
- Managing Shipment and Container Interface Records
- Application and Personal Parameter Options
- Shipping Reports

ABOUT SHIPPING AND RECEIVING

Organizations may use the shipping and receiving functionality to document the transfer of items from one organization to another.

Sunflower's Shipping and Receiving process is as follows:



Shipping Organization:

- Step 1. Pack items into Containers
- Step 2. Create Shipments and Add Containers

Receiving Organization:

- Step 3. Receive Containers
- Step 4. Reconcile and Unpack Assets

Given that shipments don't always proceed as intended, Sunflower provides users with the ability to manage shipments returned to the shipper and individual asset exceptions within the containers. Receivers can indicate if items have not be found during unpacking. Shippers can then review the shipment exceptions and mark the not found items as removed from the container.

TRANSFER TYPES

Sunflower supports two types of shipping transfers:

- **Internal Transfers:** Shipments between steward organizations. The ship from and ship to organizations must be stewards within Sunflower. When the Ship To Organization receives the items, the steward is updated automatically through the receipt and unpacking process.
- **External Transfers:** Shipments to an internal or external organization. External transfers are not meant to have a corresponding receipt transaction. Additionally, organizations may supply a final event on external transfers that will automatically retire all the items in the shipment.

ROLES

Users with the Administrator, Inventory Manager, Inventory Clerk, and Asset Center Representative roles will have access to the Shipping and Receiving functionality. Standard security related to steward contacts is enforced within the Shipping and Receiving forms. For example, if an Inventory Clerk is a steward contact of Asset Center 01, the clerk will be able to create shipments and containers for assets with a steward of Asset Center 01. Additionally, Clerks will only be able to receive shipments and containers that have a Ship To Organization of Asset Center 01.

NOTE: Users with only the asset center representative role will be unable to ship external transfers with final events as ACRs do not have sufficient rights to retire assets in Sunflower. A user with a higher role must mark those shipments as Shipped.

CREATING SHIPMENTS AND CONTAINERS

Users that are shipping items to internal or external organizations are responsible for:

- Packing items into containers
- Creating shipments with destination details
- Marking the shipment as shipped with appropriate tracking information
- Printing the Shipment Manifest

Sunflower's Shipping and Receiving functionality allows users to create either the shipment or the container first, depending upon the organization's business process. However, before a shipment is marked as shipped, at least one container must be included and the container must have at least one asset or stock item.

This section will describe how to complete the steps of the shipping organization.

PACKING ITEMS INTO A CONTAINER

Scenario: The following graphic illustrates how to create a new container and add assets and stock items to the container.

- NAVIGATION
- Click Shipments
 - Click Maintain Shipments and Containers

The screenshot shows a software window titled "Maintain Shipments and Containers (Inventory Asset - assh2010)". It has two tabs: "Shipment" and "Containers". The "Containers" tab is selected. Below the tabs, there are several input fields and buttons. In the "Container Details" section, there are fields for "Container Number", "Location *", "External Tracking #", "Steward", and "User Fields *". There are also fields for "Shipment Number", "Ship Date", "Shipment Status", "Internal Tracking #", and "Transfer Type", along with an "Add to Shipment" button. Below this, there are tabs for "Assets" and "Stock Items". The "Assets" tab is selected, showing a table with columns for "Identifier", "Manufacturer / Model / Official Name", and a "Message" field at the bottom. There is also an "Asset Search" button.

- Step 1. Navigate to the **Maintain Shipments and Containers** screen.
- Step 2. Click the **Containers** Tab.
- Step 3. Enter a unique **Container Number**. To auto-generate a container number, enter the meta-character and press the tab button.
- NOTE: The auto-generated container identifier is based upon Personal or Application level parameters. See section on Parameters in this chapter for more information.
- Step 4. Select the **Steward** Organization of container.
- NOTE: The Steward organization of the container must be the same as the Steward organization of the assets added to the container.
- Step 5. Enter **Location** of container.
- NOTE: If assets are added to the container, the assets' locations are changed to the container's location.

- Step 6. Optionally enter **External Tracking #**. This is generally done upon shipment unless already known upon packing. External Tracking numbers are used for shipments through third party shippers.
- Step 7. Double click in the **User Fields** and enter any additional container level details as needed.
- Step 8. Enter assets at the bottom of the screen.

Maintain Shipments and Containers (Inventory Asset) - assh2010

Shipment Containers

Shipment Number Shipment Status Transfer Type
Ship Date Internal Tracking #

Container Details

Container Number Steward
Location *
External Tracking # User Fields *

Assets Stock Items

Ok	Identifier	Manufacturer / Model / Official Name
<input type="checkbox"/>	<input checked="" type="checkbox"/> 0601	APPLE_M5555_COMPUTER PORTABLE
<input type="checkbox"/>	<input checked="" type="checkbox"/> 0602	DELL_D333_COMPUTER PERSONAL
<input type="checkbox"/>	<input checked="" type="checkbox"/> 0603	GATEWAY_SOLO 9100_COMPUTER PORTABLE
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	

Message

- Step 9. Use the **Assets** tab to pack barcoded assets into the container. Enter barcode Identifiers, or optionally click on **Asset Search** to search off a particular set of parameters. If using the search method, select assets as needed to **Add to Container**.

NOTE: Assets can only be located in one container. If an asset is already located in a container that has not been received or removed, an error will display that indicates the container in which it is currently located.

- Step 10. Use the **Stock Items** tab to include stock items in the container.

NOTE: The stock items in containers are not associated with individual commodity or non-serialized material assets. Rather users enter a stock number based upon the catalog, Shipped quantity and UOM.

Maintain Shipments and Containers (Inventory Asset) - assh2010

Shipment

Containers

Shipment Number

Shipment Status

Transfer Type

Ship Date

Internal Tracking #

Add to Shipment

Container Details

Container Number

Steward

Location *

External Tracking #

User Fields *

Assets

Stock Items

Ok

☐

Stock Number

Manufacturer / Model / Official Name

Quantity Shipped

UOM

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☐

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☐

☐

☐

☐

☐

☐

Message

Step 11. Press the **Save** button to save the container.

The screenshot shows the 'Maintain Shipments and Containers' application window. The 'Containers' tab is selected. The 'Container Details' section includes the following fields:

- Shipment Number: []
- Ship Date: []
- Shipment Status: []
- Internal Tracking #: []
- Transfer Type: []
- Container Number: C00000061
- Steward: ASSET CENTER 06
- Location: ARLINGTON BUILDING_1_ROOM_100
- External Tracking #: []
- User Fields: []

The 'Assets' tab is also visible, showing a list of assets with checkboxes for selection. The 'Message' field at the bottom displays 'Complete'.

Ok	Identifier	Manufacturer / Model / Official Name
<input checked="" type="checkbox"/>	0601	APPLE_M5555_COMPUTER PORTABLE
<input checked="" type="checkbox"/>	0602	DELL_D333_COMPUTER PERSONAL
<input checked="" type="checkbox"/>	0603	GATEWAY_SOLO 9100_COMPUTER PORTABLE
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

NOTE: An Ongoing Event of PACK ASSET will be recorded against all assets placed in the container. The Location will also be updated on the asset record, as appropriate.

CREATE A NEW SHIPMENT AND CONTAINERS

Required to create the shipment:

- Shipment Number
- Transfer Type
- From Information: organization and Address
- To Information: Organization and Address

Upon shipment, the Shipper Type, Tracking #s, From and To Contact information is also required. Note that Personal and Application level parameters can be used to default the From Information block.

Scenario: The following graphic illustrates how to create a new shipment

NAVIGATION

- Click Shipments
- Click Maintain Shipments and Containers

Maintain Shipments and Containers (Inventory Asset) - assh2010

Shipment Containers

Shipping Details

Shipment Number [] Shipment Status NOT SHIPPED Shipped Print Manifest

Transfer Type [] Final Event [] User Fields []

Shipper Type [] Internal Tracking # [] -OR- Courier [] Ship Date []

User Fields *

From Information

Organization ASSET CENTER 01

Address * ARLINGTON BUILDING 1 ROOM 100

Contact Name CLERK JSF 0 JSFCLERK01

To Information

Organization []

Address * []

Contact Name []

Containers

Location * []

Ok	Container Number	Steward	Location *	External Tracking #	User Fields *
<input type="checkbox"/>	[]	[]	[]	[]	[]
<input type="checkbox"/>	[]	[]	[]	[]	[]
<input type="checkbox"/>	[]	[]	[]	[]	[]
<input type="checkbox"/>	[]	[]	[]	[]	[]

Message []

Step 1. Navigate to the **Maintain Shipments and Containers** screen **Shipment** Tab.

Step 2. Enter a unique **Shipment Number**. To auto-generate a value, enter the meta-character and press the tab button.

NOTE: The auto-generated container identifier is based upon Personal or Application level parameters. See section on Parameters in this chapter for more information.

Step 3. Select the appropriate **Transfer Type** from the list of values.

NOTE: Internal transfers are between steward organizations and require receipt. External transfers do not require receipt, may specify any organization as the destination organization, and may record a final event upon shipment.

Step 4. Optionally double click in the **User Fields** to enter additional shipment information.

Step 5. Optionally select the **Shipper Type**.

NOTE: Shipper type indicates which carrier is responsible for the shipment. Internal shippers designate a tracking number at the shipment level. Third party shipment types require the entry of a Courier organization at the shipment level and an external tracking number for each container in the shipment.

Step 6. If using an Internal Shipper Type, enter **Internal Tracking #**.

Step 7. If using a Third Party Shipper Type, optionally enter the **Courier** organization.

Step 8. Select the appropriate Ship From **Organization** steward from the List of Values.

NOTE: The container steward organizations must be within and below the Ship From Steward Organization on the shipment.

Step 9. Double-click in the Ship From Location to enter the ship from location information in the **Address** field. Enter an internal or external location and press the **Save** button to return to the shipment form.

NOTE: If the Organization record of the Ship From Organization contains a value in the Location field, it will default in the Ship From Location automatically.

Step 10. Use the list of values to select the Ship From **Contact Name**.

Step 11. Enter the recipient information in **To Information**.

Step 12. Select the appropriate Ship To **Organization** from the List of Values.

NOTE: For Internal Transfers, this LOV will display Steward Organizations only. For External Transfers, the LOV will display all organizations.

Step 13. Double-click in the Ship To Location to enter the ship from location information in the **Address** field. Enter an internal or external location and press the Save button to return to the shipment form.

NOTE: If the Organization record of the Ship From Organization contains a value in the Location field, it will default in the Ship From Location automatically.

Step 14. Use the list of values to select the Ship To **Contact Name**. If your application parameters allow, users may enter new contacts or search for contacts by pressing the Edit button in this field to create or search for person records.

Step 15. Place your cursor in the **Containers** block. Note that the Location and Steward default from the Ship From Information block.

Step 16. Enter a unique **Container Number**. To auto-generate a container number, enter the meta-character and press the tab button.

NOTE: The auto-generated container identifier is based upon Personal or Application level parameters. See section on Parameters in this chapter for more information.

Step 17. Update the **Location** field as necessary.

Step 18. Optionally enter **External Tracking #**. This is generally done upon shipment unless already known upon packing. External Tracking number are used for shipments through third party shippers.

Step 19. Double click in the **User Fields** and enter any additional container level details as needed.

Step 20. Press the **Save** button to save the shipment and new container when shipment record is complete.

The screenshot shows the 'Maintain Shipments and Containers' application window. The 'Containers' tab is active. The form is divided into several sections:

- Shipping Details:** Includes fields for Number (SDHSHIPMENT2), Shipment Status (NOT SHIPPED), Transfer Type (INTERNAL), Final Event, Shipper Type (THIRD PARTY), Internal Tracking #, User Fields *, Courier (FEDEX), and Ship Date.
- From Information:** Includes Organization (ANNAM STEWARD 02), Address * (SAN FRANCISCO), and Contact Name (ONE ADM ADM01).
- To Information:** Includes Organization (ASSET CENTER 10), Address * (CRYSTAL CITY, VA), and Contact Name.
- Containers:** A table with columns: Identifier, Steward, Location *, External Tracking #, and User Fields *. The first row is highlighted in yellow and contains: SDHCONTAINER2, ANNAM STEWARD 02, SAN FRANCISCO_BUILDING, 8796879, and a User Fields * field.
- Message:** A bar at the bottom indicates 'Complete'.

CREATING SHIPMENTS AND CONTAINERS

Step 21. To add items to the container, press the **Edit** button next to the container. You will navigate to the Container tab of the specific container that was created in the Shipment Tab.

The screenshot shows a web application window titled "Maintain Shipments and Containers (Inventory Asset - asch2010)". The "Containers" tab is active. The form is divided into two main sections: "Shipment" and "Container Details".

Shipment Section:

- Shipment Number: SDHSHIPMENT2
- Ship Date: (empty)
- Shipment Status: NOT SHIPPED
- Internal Tracking #: (empty)
- Transfer Type: INTERNAL
- Remove from Shipment: (button)

Container Details Section:

- Container Number: SDHCCONTAINER2
- Location: SAN FRANCISCO
- External Tracking #: 83748920
- Steward: ANNAM STEWARD 02
- User Fields: (empty)

Assets Section:

- Assets tab is selected.
- Asset Search: (button)
- Table with columns: Identifier, Manufacturer / Model / Official Name.
- Table rows: 7 rows, each with a checkbox and two text input fields.
- Message: (empty text area)

Step 22. Enter assets at the bottom of the screen.

Step 23. Use the **Assets** tab to pack barcoded assets into the container. Enter barcode Identifiers, or optionally click on **Asset Search** to search off a particular set of parameters. If using the search method, select assets as needed to **Add to Container**.

- Step 24.** Use the **Stock Items** tab to include stock items in the container. Note that the stock items in containers are not associated with individual commodity or non-serialized material assets. Rather users enter a stock number based upon the catalog, Shipped quantity and UOM.

Shipment Number: SDHSHIPMENT2 Shipment Status: NOT SHIPPED Transfer Type: INTERNAL
 Ship Date: Internal Tracking #: Remove from Shipment

Container Details

Container Number: SDHCONTAINER2 Steward: ANNAM STEWARD 02
 Location: SAN FRANCISCO
 External Tracking #: 83748920 User Fields:

Assets **Stock Items**

Ok	Stock Number	Manufacturer / Model / Official Name	Quantity Shipped	UOM
<input checked="" type="checkbox"/>	6CABLE	NON RECORDED_ 6" CABLE_ CABLE	20.00	EA
<input checked="" type="checkbox"/>	ABC111	NON RECORDED_ CONNECTORS_ CONNECTORS	100.00	EA
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

Message: Complete

- Step 25.** Press the **Save** button to save the container.

NOTE: An Ongoing Event of PACK ASSET will be recorded against all assets placed in the container. The Location will also be updated on the asset record, as appropriate.

ADD CONTAINERS TO AN EXISTING SHIPMENT

Scenario: The following graphic illustrates how to add a new container to an existing shipment through the Container Tab.

- NAVIGATION
- Click Shipments
 - Click Maintain Shipments and Containers

- Step 1. Navigate to the **Maintain Shipments and Containers** screen.
- Step 2. Click the **Containers** Tab.
- Step 3. Create or query the Container to be shipped.
- Step 4. To query, click the **Find** button and enter the container **Identifier**. Click **Find** again to execute the query.
- Step 5. Click the **Add to Shipment** button to select the shipment the container will be shipped in.

NOTE: The list of values for the Shipments will be limited to the “From” organization of the container. If the shipment needed does not appear, then the Steward organizations on the Shipment and Container tabs differ.

Shipment Containers

Shipment Identifier Shipment Status Transfer Type
Ship Date Internal Tracking #

Container Details

Identifier Steward
Location *
External Tracking # User Fields *

Assets Stock Items

Ok ☐ Identifier ☐ SDH001 ☐ SDH002

Message

Shipments List

Shipment Number	Transfer Type	Shipped To Organization	Shipped To Location	Contact Name
AP01	INTERNAL	EXCESS CENTER	LIVERMORE	DOE JANE 050698
AR0001	EXTERNAL	ASSET CENTER 01	SAN FRANCISCO_BUILDING_1_ROOM	ANDERSON JOE 44A409
AR0002	EXTERNAL	ANNAMS SYSTEMS CORPOR	LIVERMORE_BUILDING_H_ROOM_10	JONES SUSAN 0 04
AR0004	INTERNAL	ASSET CENTER 06	LIVERMORE	ANDERSON JOE 44A409
AR0006	INTERNAL	ANNAM STEWARD 03	DEMOCRACY BLVD	DAVIS ANN
AR0007	INTERNAL	ANNAM STEWARD 03	LIVERMORE_BUILDING_1_ROOM_10	DAVIS ANN
ED02	INTERNAL	EXCESS CENTER	ARLINGTON	DOE JOHN 050598
SDHSHIPMENT1	INTERNAL	ASSET CENTER 03	BATON ROUGE, LA_BUILDING_TIGER S	DAVIS ANN

Step 6. **Save** to add the container to the shipment.

REMOVE CONTAINERS FROM A SHIPMENT

Scenario: The following graphic illustrates how to remove a container to an existing shipment through the Containers Tab.

NAVIGATION

- Click Shipments
- Click Maintain Shipments and Containers

The screenshot shows the 'Maintain Shipments and Containers' window. The 'Containers' tab is selected. The 'Shipment' section includes fields for Shipment Number, Ship Date, Shipment Status, Internal Tracking #, and Transfer Type, along with an 'Add to Shipment' button. The 'Container Details' section includes fields for Container Number, Location, External Tracking #, and Steward. At the bottom, there is a table with columns 'Identifier' and 'Manufacturer / Model / Official Name', and an 'Asset Search' button.

- Step 1. Navigate to the **Maintain Shipments and Containers** screen.
- Step 2. Click the **Containers** Tab.
- Step 3. Create or query the Container to be shipped.
- Step 4. To query, click the **Find** button and enter the container **Identifier**. Click **Find** again to execute the query.

CREATING SHIPMENTS AND CONTAINERS

Step 5. Click the **Remove From Shipment** button to select the shipment the container will be shipped in.

Maintain Shipments and Containers (Inventory Asset) - assh2010

Shipment **Containers**

Shipment Number	<input type="text"/>	Shipment Status	<input type="text"/>	Transfer Type	<input type="text"/>
Ship Date	<input type="text"/>	Internal Tracking #	<input type="text"/>	<button>Add to Shipment</button>	

Container Details:

Container Number	<input type="text"/> SDHCONTAINER2	Steward	<input type="text"/> ANNAM STEWARD 02
Location *	<input type="text"/> SAN FRANCISCO		
External Tracking #	<input type="text"/> B374B920	User Fields *	<input type="text"/>

Assets **Stock Items**

Ok	<input type="checkbox"/>	Stock Number	Manufacturer / Model / Official Name	Quantity Shipped	UOM
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CABLE	NON RECORDED_6" CABLE_CABLE	20.00	EA
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ABC111	NON RECORDED_CONNECTORS_CONNECTORS	100.00	EA
<input type="checkbox"/>	<input type="checkbox"/>				
<input type="checkbox"/>	<input type="checkbox"/>				
<input type="checkbox"/>	<input type="checkbox"/>				
<input type="checkbox"/>	<input type="checkbox"/>				
<input type="checkbox"/>	<input type="checkbox"/>				
<input type="checkbox"/>	<input type="checkbox"/>				
<input type="checkbox"/>	<input type="checkbox"/>				

Message Complete

Step 6. Press **Save** to save your changes.

REMOVE ASSETS FROM A CONTAINER

Scenario: The following graphic illustrates how to remove assets and stock items from a container.

- NAVIGATION
- Click Shipments
 - Click Maintain Shipments and Containers

Ok	Identifier	Manufacturer / Model / Official Name
<input checked="" type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

- Step 1. Navigate to the **Maintain Shipments and Containers** screen.
- Step 2. Click the **Containers** Tab.
- Step 3. Create or query the Container to be shipped.
- Step 4. To query, click the **Find** button and enter the container **Identifier**. Click **Find** again to execute the query.
- Step 5. Search for the assets that you want to remove from the container.
- Step 6. Enable the checkbox in front of the asset(s) that you want to remove.
- Step 7. Click the **Remove Record** button remove the items from the container.
- Step 8. Press **Save** to save your changes.

NOTE: An ongoing event of REMOVED FROM CONTAINER will display on the asset's timeline. Note that the asset location will remain the container location. If the location of the item requires update, navigate to the Maintain Inventory Assets or Change Inventory Asset Information screens to update.

MARK A SHIPMENT AS SHIPPED

Required to mark a shipment as Shipped:

- Shipper Type
- Internal Tracking #
- Courier and Internal Tracking #
- From and To Contact Name
- Final Event Type and Final Event UDFs

Scenario: The following graphic illustrates how to mark a shipment as shipped.

NAVIGATION

- Click Shipments
- Click Maintain Shipments and Containers

The screenshot displays the 'Maintain Shipments and Containers' application window. The 'Shipment' tab is selected. The 'Shipping Details' section contains fields for 'Shipment Number', 'Transfer Type', 'Shipper Type', 'User Fields', 'Shipment Status' (currently 'NOT SHIPPED'), 'Final Event', 'Internal Tracking #', and a 'Shipped' button. The 'From Information' section shows 'Organization' as 'ASSET CENTER 01', 'Address' as 'ARLINGTON BUILDING 1 ROOM 100', and 'Contact Name' as 'CLERK JSF 0 JSFCLEK01'. The 'To Information' section has fields for 'Organization', 'Address', and 'Contact Name'. The 'Containers' section includes a table with columns: 'Ok', 'Container Number', 'Steward', 'Location', 'External Tracking #', and 'User Fields'. A 'Message' field is located at the bottom of the form.

Step 1. Navigate to the **Maintain Shipments and Containers** screen **Shipment** Tab.

Step 2. Query for the **Shipment Number**.

Step 3. Verify the **Shipper Type**.

NOTE: Shipper type indicates which carrier is responsible for the shipment. Internal shippers designate a tracking number at the shipment level. Third party shipment types require the entry of a Courier organization at the shipment level and a external tracking number for each container in the shipment.

- Step 4. For Internal Shipper Types, verify the **Internal Tracking #**.
- Step 5. For Third Party Shipper Types, verify the Courier and External Tracking # for all containers in the shipment.
- Step 6. Click the **Shipped** button.

The screenshot displays the 'Maintain Shipments and Containers (Inventory Asset) - asch2010' application window. The 'Containers' tab is selected. A 'Shipment Confirmation' dialog box is overlaid, requiring input for 'Ship Date', 'Final Event', and 'User Fields *'. The main form contains the following sections:

- Shipping Details:** Shipment Number (S00000021), Shipment Status (NOT SHIPPED), Transfer Type (EXTERNAL), Shipper Type (INTERNAL), Internal Tracking # (X), and buttons for 'Shipped' and 'Print Manifest'.
- From Information:** Organization (SUNFLOWER SYSTEM), Address (LIVERMORE), and Contact Name (DOE JOHN).
- Containers Table:** A table with columns: Container Number, Steward, Location, External Tracking #, and User Fields. The first row is highlighted with container number C00000021, Steward SUNFLOWER SYSTEM, and Location LIVERMORE_BUILDING_G.

- Step 7. Enter the **Ship Date**.
- Step 8. If an External Shipment and Final Events are applicable, enter a **Final Event Type** from the LOV. Double-click in the **User Fields** and enter any additional final event information.
- Step 9. Press **OK** to save.

NOTE: Once you press OK, the record is saved.

Shipping Details

Shipment Number

S000000021

Shipment Status

SHIPPED

Print Manifest

Transfer Type

EXTERNAL

Final Event

TRANSFER

User Fields

Shipper Type

INTERNAL

Internal Tracking #

X

.OR.

Courier

User Fields *

Ship Date

03/02/2014

From Information

Organization

SUNFLOWER SYSTEMS

Address *

LIVERMORE_BUILDING_G

Contact Name

DOE JOHN 050598

To Information

Organization

EXCESS CENTER

Address *

ARLINGTON

Contact Name

DOE JANE 050698

Containers

Location *

LIVERMORE_BUILDING_G

Ok	Container Number	Steward	Location *	External Tracking #	User Fields *
<input type="checkbox"/>	000000021	SUNFLOWER SYSTEM	LIVERMORE_BUILDING_G		
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Message

MARK A SHIPMENT AS RETURNED

When a shipment is returned to the sender, the shipping organization may use Sunflower to mark the shipment as returned. The status of the shipment will be updated to Returned and can no longer be received by the destination organization. Containers that are associated to the shipment will be removed from the shipment and can be assigned to new shipments as required. Assets will remain within the containers that were on returned shipments. Refer to the Removing assets from containers steps if the items are returned to the general stock and no longer grouped for shipment. Note that external shipments cannot be marked as returned.

Scenario: The following graphic illustrates how to mark a shipment as returned.

NAVIGATION

- Click Shipments
- Click Maintain Shipments and Containers

The screenshot shows the 'Maintain Shipments and Containers' screen with the 'Shipment' tab selected. The interface includes several sections: 'Shipping Details' with fields for Shipment Number, Transfer Type, Shipper Type, User Fields, Shipment Status (set to 'NOT SHIPPED'), Final Event, Internal Tracking #, and Ship Date; 'From Information' with fields for Organization (ASSET CENTER 01), Address (ARLINGTON BUILDING 1 ROOM 100), and Contact Name (CLERK JSF 0 JSFCLERK01); 'To Information' with fields for Organization, Address, and Contact Name; and a 'Containers' section with a table for tracking containers. The table has columns for Container Number, Steward, Location, External Tracking #, and User Fields. A 'Message' field is at the bottom.

- Step 1. Navigate to the **Maintain Shipments and Containers** screen **Shipment** Tab.
- Step 2. Query for the **Shipment Number**.
- Step 3. Verify the shipment is the one that should be returned.
- Step 4. Click the **Return** button.

NOTE: You will receive a prompt to confirm that you want to return the shipment. Once you click Yes to the message, the transaction will be saved and cannot be reversed.

Step 5. Click **Yes** button.

NOTE: The containers will be detached from the shipment automatically and the shipment status will be Returned. Note that the assets located in the containers returned will receive a 'Shipment Returned' event on the timeline.

Maintain Shipments and Containers (Inventory Asset) - assh2010

Shipment

Containers

Shipping Details

Shipment Number

SDSHIPMENT

Shipment Status

RETURNED

Print Manifest

Transfer Type

INTERNAL

Final Event

User Fields

Shipper Type

THIRD PARTY

Internal Tracking #

-OR-

Courier

FEDEX

User Fields *

Ship Date

03/02/2014

From Information

Organization

ANNAM STEWARD 02

Address *

SAN FRANCISCO

Contact Name

ONE ADM ADM01

To Information

Organization

ASSET CENTER 10

Address *

LIVERMORE

Contact Name

ANDERSON JOE 44A409

Containers

Location *

SAN FRANCISCO

Ok	Container Number	Steward	Location *	External Tracking #	User Fields *
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Message

UPDATING A SHIPMENT

Certain fields can be updated on a shipment depending upon the status of the shipment. Most changes can be made while the shipment is still not shipped. Once the shipment has been marked as shipped, certain fields cannot be updated. Once at least one container on a shipment has been received by the Ship To organization, no changes can be made in the Maintain Shipments and Containers form. Any shipping exceptions must be processed through the Verify Shipping Exception form.

The table below describes the fields that can be updated based upon the shipment status:

FIELD NAME	Can Update in Not Shipped Status	Can Update in Shipped Status
Shipment Number	Yes	No
Transfer Type	Yes	No
Shipper Type	Yes	No
Internal Tracking Number	Yes	Yes
Courier	Yes	No
Shipment User Fields	Yes	Yes
From Information		
Organization	Yes	No
Address	Yes	No
Contact Name	Yes	No
To Information		
Organization	Yes	Yes
Address	Yes	Yes
Contact Name	Yes	Yes
Container		
Container Number	Yes	No
Steward	Yes, but must be within steward hierarchy of Ship From Organization.	No
Location	Yes. Note location of all assets in container will be updated as well.	No
User Defined Field	Yes	Yes
External Tracking Number	Yes	Yes

Scenario: The following graphic illustrates how to update a shipment

- NAVIGATION
- Click Shipments
 - Click Maintain Shipments and Containers

Maintain Shipments and Containers (Inventory Asset0 - asst2010)

Shipment Containers

Shipping Details

Shipment Number [] Shipment Status NOT SHIPPED Shipped Print Manifest

Transfer Type [] Final Event [] User Fields []

Shipper Type [] Internal Tracking # [] -OR- Courier []

User Fields * [] Ship Date []

From Information

Organization ASSET CENTER 01

Address * ARLINGTON BUILDING 1 ROOM 100

Contact Name CLERK JSF 0 JSFCLEKID1

To Information

Organization []

Address * []

Contact Name []

Containers

Location * []

Ok	Container Number	Steward	Location *	External Tracking #	User Fields *
<input type="checkbox"/>	[]	[]	[]	[]	[]
<input type="checkbox"/>	[]	[]	[]	[]	[]
<input type="checkbox"/>	[]	[]	[]	[]	[]
<input type="checkbox"/>	[]	[]	[]	[]	[]

Message []

- Step 1. Navigate to the **Maintain Shipments and Containers** screen **Shipment** Tab.
- Step 2. Query for the **Shipment Number**.
- Step 3. Update the required information.
- Step 4. Press the **Save** button.

RECEIVING SHIPMENTS AND CONTAINERS

The receiving process within Sunflower's Shipping and Receiving functionality is a two step process. The first step is to receive the containers that are included in the shipment. At that time, the receipt date is indicated as well as the new location of the container. Once the container has been received, the contents of the container can be unpacked. At this point, for each asset unpacked, the steward organization responsible for the items is updated to the recipient organization and information on the item location, status, user and custodian can also be updated. In the event that items are indicated as being shipped but not found in the container during unpacking, the receiving organization can mark the item as not found and the shipping organization must reconcile these exceptions. Stock items are also unpacked and the received quantity is indicated upon unpacking.

The following processes will be covered in this section

- Receiving Containers on Shipments
- Unpacking Containers

This section will describe how to complete the steps of the receiving organization.

RECEIVING CONTAINERS ON A SHIPMENT

The first step is to indicate that the container has been received by the Ship To organization. At that point, the date of receipt is recorded as well as the new location of the container. Given that the individual items within the container have not been verified or unpacked, no changes to the asset records are processed at the time that the container is received.

Scenario: The following graphic illustrates how to mark a containers on a shipment as received.

NAVIGATION

- Click Shipments
- Click Receive Shipments and Containers

Receive Shipments and Containers (Inventory Asset) - assh2020

Shipment Containers

Shipping Details

Shipment Number Shipped Date User Fields * Shipment Status Shipper Type Transfer Type Courier

From Information

Organization Address * Contact Name

To Information

Organization Address * Contact Name

Not Received Received

Received Location * Received Date

Ok	Container Number	External Tracking #	Location *	User Fields *	Received Date
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Message

Step 1. Navigate to the **Receive Shipments and Containers** screen **Shipment** Tab.

Step 2. Query for the **Shipment Number**.

NOTE: The containers that require receiving are displayed in the Not Received tab. Any containers that have already been received on the shipment will be displayed on the Received tab.

Step 3. Select the **Received** checkbox in front of each Container Number that is being received.

Step 4. Double click in the Location field to enter the receiving location of the container.

Step 5. Update the Received Date, and User Fields of the individual containers as necessary.

NOTE: By default, the **Received Date** will default to the current date.

Step 6. Press the **Save** button.

Receive Shipments and Containers (Inventory Asset) - assh2020

Shipment Containers

Shipping Details

Number SDHSHIPMENT Shipment Status RECEIVED Transfer Type INTERNAL

Shipped Date 02/13/2014 06:59:50 AM Shipper Type INTERNAL Internal Tracking # 0970967

User Fields *

From Information

Organization ANNAM STEWARD 02

Address * SAN FRANCISCO

Contact Name ONE ADM ADM01

To Information

Organization ASSET CENTER 03

Address * BATON ROUGE, LA _BUILDING_ TIGER STADIUM_R

Contact Name DAVIS ANN

Not Received Received

Received

Location * BATON ROUGE, LA _BUILDING_ TI Received Date 02/13/2014

Ok	Identifier	Tracking #	Location *	User Fields *	Received Date
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SDHCONTAINER1	BATON ROUGE, LA _BUILDING_ TI		02/13/2014
<input type="checkbox"/>	<input type="checkbox"/>				
<input type="checkbox"/>	<input type="checkbox"/>				
<input type="checkbox"/>	<input type="checkbox"/>				
<input type="checkbox"/>	<input type="checkbox"/>				

Message Complete

UNPACKING CONTAINERS

Once a container has been received, the Ship To Organization must unpack it to complete the transfer between organizations. When unpacking barcoded assets, the steward organization will be updated to the Ship To organization on the shipment. In addition, the location of assets will be updated to the container location by default. Additionally, the receiving clerk may update the following fields upon unpacking:

- Activity Status
- Condition
- User
- Custodian

The receiving clerk can choose to update the above fields for all assets that are unpacked from the container or specific values for each item being unpacked.

When unpacking stock items, clerks must indicate the quantity received. No updates are made to existing material or stock in Sunflower upon unpacking. A separate receipt transaction must be completed to increase the individual stock levels of a warehouse.

If the container record contains items that were not found at the receiving location, the receiving clerk should mark those items as being 'Not Found'. This indication will alert the shipping organization to the item level exception. The not found items remain in the shipping organizations steward organization and are not transferred to the destination steward. If items were received by clerks that were not included in the container record, an off line process must be followed to request transfer of the record in a separate shipment.

Scenario: The following graphic illustrates how to unpack containers:

- NAVIGATION
- Click Shipments
 - Click Receive Shipments and Containers

The screenshot shows the 'Receive Shipments and Containers' screen with the 'Containers' tab selected. The 'Container Details' section is highlighted in yellow. It contains fields for Shipment Number, Shipped Date, Shipment Status, Courier, Transfer Type, Container Number, Steward, External Tracking #, Status, Location, Received Date, and User Fields. Below this is the 'Assets' section with checkboxes for 'Unpack' and 'Not Found'. The 'Unpack' section has a table with columns for 'Identifier' and 'Manufacturer / Model / Official Name'. The 'Not Found' section has a table with columns for 'Steward', 'Location', 'Activity Status', 'Custodian', 'User', and 'Asset Condition'. At the bottom is a 'Message' field.

- Step 1.** Navigate to the **Receive Shipments and Containers** screen **Containers** Tab.
- Step 2.** Click the **Find** button to search for the container to be unpacked.
- Step 3.** Enter the search criteria such as **Container Number** and click **Find** again.
- Step 4.** Optionally, update the following fields to be applied to all assets that are being unpacked:

FIELD NAME	Description/Explanation
Steward	The Steward organization receiving the items. Defaults to the ship to organization and cannot be updated.
Location	The location of the unpacked assets. Defaults to the Container location but can be updated.
Activity Status	Optional: Activity status of the items being unpacked.
Custodian	Optional: The custodian of the assets being unpacked. Note to set the custodian field to a blank value, enable the checkbox in front of Custodian and leave the value blank.
User	Optional: The user of the assets being unpacked. Note to set the User field to a blank value, enable the checkbox in front of User and leave the value blank.
Asset Condition	Optional: The condition of the assets being unpacked. Note to set the condition field to a blank value, enable the checkbox in front of Condition and leave the value blank.

Step 5. Click the **Unpack** box next to each asset in the container that will be unpacked – or click the button just under the word **Unpack** to unpack all assets in that container.

Step 6. To update the asset record values for an individual asset, click the **Identifier** and update the various fields to the right of each asset.

NOTE: To search for a specific asset in the list, users may use the **Find** button while the cursor is in the asset block. Enter your asset identifier and press the **Find** button to execute the query.

Step 7. For those assets that are not found in the container, click the **Not Found** checkbox to the right of the item.

Example: Below is a sample unpacked container.

Receive Shipments and Containers Inventory Asset - 355h.2020

Shipment Containers

Shipment Number: ACR02-1 Shipment Status: RECEIVED Transfer Type: INTERNAL

Shipped Date: 03/01/2014 Internal Tracking #:

Container Details

Container Number: ACR02-1B Status: PARTIALLY UNPACKED Received Date: 03/01/2014

Steward: ASSET CENTER 01 Location: GENERAL OFF SITE_123 MAIN STREET_WASHINGTON_DC_US

External Tracking #: User Fields:

Assets Stock Items

Steward: ASSET CENTER 01 Location: GENERAL OFF SITE_123 MAIN STREET_WASHINGTON_DC_US

Activity Status: ☒ IN SERVICE Custodian: ☒

User: ☒ Asset Condition: ☒ 4 USED - GOOD

Unpack Not Found

Ok	Identifier	Manufacturer / Model / Official Name	Not Found
<input checked="" type="checkbox"/>	0201	APPLE_M5555_COMPUTER PORTABL	<input type="checkbox"/>
<input checked="" type="checkbox"/>	0202	DELL_D333_COMPUTER PERSONAL	<input type="checkbox"/>
<input type="checkbox"/>	0203	GATEWAY_SOLO 9100_COMPUTER F	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	0204	GATEWAY_SOLO 9100_COMPUTER F	<input type="checkbox"/>
<input type="checkbox"/>	0205	FORD MOTOR COMPANY_TAURUS_S	<input type="checkbox"/>
<input checked="" type="checkbox"/>	0206	TEKTRONIX_T11209_OSCILLOSCOPE	<input type="checkbox"/>

Steward: Location: Activity Status: Custodian: User: Asset Condition:

Message:

Step 8. Click the **Stock Items** tab to view stock items shipped in the container.

Step 9. For each stock line, enter the quantity received. If the item was not received, enter 0.

Assets Stock Items

Unpack

Ok	<input type="checkbox"/>	Stock Number	Descriptive	Received Quantity	Quantity Shipped	UOM
<input type="checkbox"/>	<input checked="" type="checkbox"/>	6CABLE	NON RECORDED__6" CABLE__CABLE	.00	20.00	EA
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ABC111	NON RECORDED__CONNECTORS__CONNECTORS	100.00	100.00	EA
<input type="checkbox"/>	<input type="checkbox"/>					
<input type="checkbox"/>	<input type="checkbox"/>					
<input type="checkbox"/>	<input type="checkbox"/>					
<input type="checkbox"/>	<input type="checkbox"/>					
<input type="checkbox"/>	<input type="checkbox"/>					
<input type="checkbox"/>	<input type="checkbox"/>					
<input type="checkbox"/>	<input type="checkbox"/>					
<input type="checkbox"/>	<input type="checkbox"/>					

Message

Step 10. Select the unpack checkbox.

Step 11. **Save** to unpack the assets.

RECEIVING SHIPMENTS AND CONTAINERS

NOTE: An Ongoing Event of UNPACK ASSET will be recorded on the Timeline of all assets in the container(s) that were unpacked. In addition, the Timeline will record updates to the Steward, Custodian, User and Location.

Inventory Asset Summary and History - asmin2055 (Page 1 of 2)

Assets Identifier: **SDH001** Identifier Type: Parents: 0 Children: 0 C/A/P: 0
 Unique Name: _____ Current Identifier: SDH001
 Default Location: LIVERMORE_BUILDING_B_ROOM_E

Timeline Details

UII: None Captured
 Other Identifiers: INV / SDH001

☒ Include Events
☒ Include Resolutions
☒ Include Contract Reports
☒ Include Meter Readings

☒ Include Open Requests
☒ Include Closed Requests
☒ Include IUID/MAWF
☒ Include Configuration and Kitting

Sort By: 1 DATETIME DESC
 2 DATETIME DESC
 3 DATETIME DESC

Get Records

Datetime	Category	Description	Attributes	Document?
02/13/2014 11:41:35	ONGOING EVENT	CHANGE LOCATION	BATON ROUGE, LA_BUILDING_TIGER STADIUM	
02/13/2014 11:41:35	ONGOING EVENT	CHANGE USER	HOPKINS SCOTT SDHOPKINS	
02/13/2014 11:41:35	ONGOING EVENT	CHANGE CUSTODIAN	FRAZIER KRISTEN S 020966	
02/13/2014 11:41:35	ONGOING EVENT	CHANGE STEWARD	ASSET CENTER 03	
02/13/2014 11:41:35	ONGOING EVENT	UNPACK ASSET	SDHCONTAINER1_BATON ROUGE, LA_BUILDING	
02/13/2014 11:19:27	ONGOING EVENT	CONTAINER RECEIVED	SDHCONTAINER1_SDHSHIPMENT1	
02/13/2014 08:59:51	ONGOING EVENT	CONTAINER SHIPPED	SDHCONTAINER1_SDHSHIPMENT1	
02/13/2014 07:31:37	ONGOING EVENT	CHANGE LOCATION	ARLINGTON_BUILDING_1_ROOM_100	
02/13/2014 07:18:36	ONGOING EVENT	PACK ASSET	SDHCONTAINER1	
02/13/2014 07:06:42	ONGOING EVENT	ASSET VALUE/QUANTITY INCREASE	ACQUISITION COST_2500_0	

Timeline Report Record Properties

RECEIVING SHIPMENTS AND CONTAINERS

NOTE: An Ongoing Event of ASSET NOT RECEIVED will be recorded on the Timeline of all assets in the container(s) that were marked as 'Not Found'. In addition, the asset will still indicate that it remains in the container until such time that it is unpacked or removed by the shipper.

Inventory Asset Summary and History - asmn2055 (Page 1 of 2)

Assets Identifier: **SDH002** Identifier Type: Parents: 0 Children: 0 C/A/P: ☐

Unique Name:

Default Location*: **LIVERMORE__BUILDING__B__ROOM__E**

Timeline Details

UI:

Other Identifiers: **INV / SDH002**

Sort By: 1 **DATETIME DESC** 2 **DATETIME DESC** 3 **DATETIME DESC**

☒ Include Events ☒ Include Open Requests ☒ Include Resolutions ☒ Include Closed Requests ☒ Include Contract Reports ☒ Include IUID/WAWF ☒ Include Meter Readings ☒ Include Configuration and Kitting

Datetime	Category	Description	Attributes	Document?
02/13/2014 11:54:55	ONGOING EVENT	ASSET NOT RECEIVED	SDHCONTAINER1	<input type="checkbox"/>
02/13/2014 11:19:27	ONGOING EVENT	CONTAINER RECEIVED	SDHCONTAINER1__SDHSHIPMENT1	<input type="checkbox"/>
02/13/2014 06:59:51	ONGOING EVENT	CONTAINER SHIPPED	SDHCONTAINER1__SDHSHIPMENT1	<input type="checkbox"/>
02/13/2014 07:31:37	ONGOING EVENT	CHANGE LOCATION	ARLINGTON__BUILDING__1__ROOM__100	<input type="checkbox"/>
02/13/2014 07:19:53	ONGOING EVENT	PACK ASSET	SDHCONTAINER1	<input type="checkbox"/>
02/13/2014 07:07:03	ONGOING EVENT	ASSET VALUE/QUANTITY INCREASE	ACQUISITION COST__2500__0	<input type="checkbox"/>
02/13/2014 07:07:03	INITIAL EVENT	(INV SDH002) PURCHASED		<input type="checkbox"/>

MANAGING SHIPMENT EXCEPTIONS

After the container is unpacked by the destination location, the shipment and container should be reviewed to ensure that all items and quantities in the original shipment document matches the actual items received. If the recipient organization indicates while unpacking that an asset was not found or the quantity of stock assets was different than the amount shipped, the shipping organization should research the discrepancies and take necessary actions. If it is found that the items were not actually in the shipment, the Ship From organization can remove them from the container. It is important to complete this step as an asset can only be in a single container. If the item is not removed, it will not be able to be place in another container.

This section will describe how to update containers due to shipment exceptions.

VERIFYING AND REMOVING SHIPPING EXCEPTIONS

Scenario: The following graphic illustrates how to create a new container and add assets and stock items to the container.

NAVIGATION

- Click Shipments
- Click Verify Shipment Exceptions

The screenshot shows the 'Verify Shipment Exceptions' window. It includes sections for Shipment Details, From/To Information, Container Details, and Assets. The Assets section is currently selected, showing a table for tracking items with checkboxes for removal, not found, or unpacked status.

- Step 1. Navigate to the **Verify Shipment Exceptions** screen.
- Step 2. Click the **Find** button to enter your search criteria, such as **Container Number**.
- Step 3. Click the **Find** button again to execute your search.
- NOTE: The information for shipment, container details and assets will populate.
- Step 4. Review the **Container Details** section. Note that if multiple containers were associated with the shipment, use the scroll bar to identify the container with the exceptions.
- Step 5. On the **Assets** tab, review the status of the items in the container.

FIELD NAME	Description/Explanation
RM	Enable this checkbox to remove the item from the container.
NF	Display only indicator. Item was marked as not found by the receiving organization.
UP	Display only indicator. Item was unpacked by receiving organization.

FIELD NAME	Description/Explanation
Identifier	Asset identifier of the item in the container.
Descriptives	Descriptive information on the item, such as the Manufacturer, Model Number, and Official Name.
Unpack/Not Found Date	Display only. The date that the receiver unpacked the item or marked it as Not Found.

Step 6. Enable the **RM** checkbox on the line of any Identifier that should be removed from the container.

NOTE: Contacts of the Ship From Organization may remove items that are in a Not Found or Not Received status. If an item was unpacked from a container, the item may not be removed.

Step 7. Press the **Save** button to save the changes to the container.

Step 8. Review the **Message** for each item removed. Note that the asset will remain in the location of the container when originally shipped. Any additional updates should be made through the Maintain Inventory Asset form.

Step 9. Click the **Stock Items** tab to review the status of the stock items in the shipment.

FIELD NAME	Description/Explanation
RM	Enable this checkbox to make the shipped quantity equal to the received quantity of the stock item.
NF	Display only indicator. Item was marked as not found by the receiving organization.
UP	Display only indicator. Item was unpacked by receiving organization.
Stock Number	The stock number of the item.
Descriptive	The description of the stock item.
Unpack/Not Found Date	Display only, the date that item was unpacked or quantity received was indicated.
Quantity Shipped	The original shipment quantity.
Quantity Received	Display only, The quantity received by the Ship To organization.
UOM	Display only. The unit of measure of the stock item.

Step 10. Enable the **RM** checkbox in front of the items that you want the Quantity Shipped to be Updated to the Quantity Received.

Step 11. Press the **Save** button to save the updates to the **Stock Items**.

Step 12. Review the **Message** field for each line item to validate that the updates were saved successfully.

VIEWING SHIPMENT SUMMARIES

The Shipment Summary screen provides a concise description of each shipment, including the shipment status, the containers included in the shipment, and the assets included in the containers. For each shipment, container, and item, the shipment summary provides a status as well as the user name and date that key transactions were performed. For example, for assets in a container, the Shipment Summary indicates who packed it into the container on what date as well as who unpacked it and when the unpacking was completed. The Shipment Summary screen can be accessed from the main menu as well as through the lookup button on the asset timeline for any shipping events.Reviewing Shipment Summary Information.

Scenario: The following graphic illustrates how to access and view the shipment details through the Shipment Summary screen.

- NAVIGATION
- Click Shipments
 - Click Shipment Summary

The screenshot shows the 'Shipment Summary - assh2055' window. It is divided into three main sections: Shipment Details, Container Details, and Assets/Stock Items. The Shipment Details section includes fields for Shipment Number, Internal Tracking #, Shipment Status, Transfer Type, User Fields, From Information (Organization, Address, Contact Name), and To Information (Organization, Address, Contact Name). It also has fields for Created By, Closed By, Shipped By, and Returned By, each with an 'On' date field. The Container Details section includes fields for Container Number, Status, External Tracking #, Created By, Received By, and User Fields. The Assets/Stock Items section has a tabbed interface with 'Assets' selected. It features a table with columns for Identifier, Descriptives, and Status. To the right of the table are fields for Packed By, Unpacked By, and Removed By, each with an 'On' date field.

- Step 1. Navigate to the **Shipment Summary** screen.
- Step 2. Click the **Find** button.
- Step 3. Enter your search criteria and press **Find**.

Step 4. Review the Shipment Summary Information as described in the table below:

NOTE: To search for a specific asset in the container, place the cursor in the **Identifier** field, press the **Find** button, enter your barcode, and press the **Find** button to execute the search.

FIELD NAME	Description/Explanation
Shipment Number	The unique identifier of the shipment.
Shipment Status	The current status of the shipment. Options include: Not Shipped, Shipped, Returned, Partially Received, Received.
Transfer Type	The organization to which the shipment is being made. Options are Internal and External.
From Organization	The ship from organization.
From Address	The ship from address or location.
From Contact Name	The contact of the ship from organization.
To Organization	The organization the items are being shipped to.
To Address	The address or location that the items are being shipped to.
To Contact Name	The person or contact that the items are being shipped to.
Created By	The user and date that the shipment was created or last updated.
Shipped By	The name of the user and date the shipment was shipped.
Closed By	The name of the user and the date the shipment was fully received.
Returned By	The name of the user and the date the shipment was returned.
Container	
Container Number	The unique identifier of the container.

FIELD NAME	Description/Explanation
Container Status	The current status of the container. Options are: Packed, Shipped, Received, Partially Unpacked, Fully Unpacked, Returned.
Created By/On	The user and date the container was created.
Received By/On	The user and date the container was received.
Container Items	
Assets Tab	
Identifier	The asset identifier of the item in the container.
Descriptives	The description of the item in the container.
Status	The current status of the item in the container. Options are: Packed, Shipped, Unpacked, Not Found, Removed.
Packed By/On	The user and date that the item was packed in the container.
Unpacked By/On	The user and date that the item was unpacked from the container.
Removed By/On	The user and date that the item was removed from the container.
Stock Items Tab	
Stock Number	The stock number of the item.
Descriptive	The description of the stock item.
Received	The quantity of the stock item received.
Quantity	The quantity of the stock item shipped.
UOM	The unit of measure of the stock item.
Packed By/On	The user and date the item was packed in the container.
Unpacked By/On	The user and date that the item was unpacked from the container.
Removed By/On	The user and date that the item was removed from the container.

MANAGING SHIPMENT AND CONTAINER INTERFACE RECORDS

Use the Shipments module's Edit Container and Shipments Interface Records screen to review errors in data transferred into Sunflower from other systems or from Sunflower PackTrak. If an error is encountered in the load process, users may navigate to this form, review and update the records, and process the data again.

This screen contains three main tabs:

- Shipments
- Containers
- Container Assets

Certain transactions may contain information in all three tabs, while other transactions may only have data in one or two. The transaction code on each tab will indicate what type of transaction is being migrated.

EDIT AND PROCESS SHIPMENT AND CONTAINER INTERFACE RECORDS

Scenario: The following graphic illustrates how to search, update, and process Shipment and Container transactions through the Edit Container and Shipment Interface Records form.

NAVIGATION

- Click Shipments
- Click Edit Container and Shipment Interface Records

Step 1. Navigate to the **Edit Container and Shipment Interface Records** screen.

Step 2. Click the **Find** button.

Step 3. Enter your search criteria such as **Load Group** or **Record Group** and press **Find**.

Step 4. Navigate to the tab that you want to update. Review the tabs and their contents below:

TAB	DEFINITION
Shipment> Shipment Details	Displays shipment header information such as identifier, transfer type, shipment type, transaction code, Ship From and Ship To organization and contact information.
Shipment > Shipped From Location	Displays the ship from location information.
Shipment > Destination Location	Displays the ship to location information.
Shipment > Final Event	Displays final event and final event user defined fields for external shipments.
Shipment > User Fields	Displays shipment user fields.

TAB	DEFINITION
Container > Container/Asset Details	Displays container identifier, steward organization, associated shipment identifier and transaction code.
Container > Location	Displays the container location.
Container > User Fields	Displays the container user fields.
Container Assets > Asset	Displays the container asset, stock item information, and transaction code.
Container Assets> Change To Information	Displays the information that should be updated on the asset record when unpacking an item.
Container Assets > Location	Displays the location information that should be updated on the asset record when unpacking the item.

- Step 5. Update the fields as required.
- Step 6. Click the **Save** button to save the field level changes.
- Step 7. Click the **Process** button to process the changes. This action will then apply those changes to the asset records.
- Step 8. Review the **Result** field on each tab to view status of the record after process.

APPLICATION AND PERSONAL PARAMETER OPTIONS

Sunflower provides a set of personal and application level parameters to control the functionality of the Shipping and Receiving function as well as provide users with time saving default values. This section will review the various parameter options available. Application level parameters must be set by Administrators. Personal parameters must be set by each individual user.

All parameters related to the Shipping and Receiving are in the category 'HVS' or High Volume Shipping. The table below provides the parameter code, description, and indicator if the parameter is available at the personal level.

PARAMETER CODE	Description	Personal Parameter Option
AUTORETIRE	Automatically retire assets that are in external shipments. When set to Yes, the final event and final event UDF fields will be available when shipping external transfers.	No
DCNLENGTH	Default length for a generated container identifier.	Yes
DCNPREFIX	Default prefix for generating container identifiers.	Yes
DSHFRCNTC	* Default Shipped from Contact Name.	Yes
DSHFRLOC	* Default Shipped from location.	Yes
DSHFRORG	Default Shipped from Organization.	Yes
DSHLENGTH	Default length for a generated shipment identifier.	Yes
DSHPREFIX	Default prefix for generating shipment identifiers.	Yes

SHIPPING REPORTS

Sunflower provides a flexible web-based reporting system. The Sunflower database is queried when a report is created and executed. Reports display real-time information. Therefore, an afternoon report may differ from a morning report by reflecting any changes made throughout the day.

There are several output options available for reports.

- PDF (Adobe Acrobat)
- HTML
- Text

Outputs depend upon the report selected. Acrobat and HTML are standard options provided for most reports. Text file export is available for selected reports.

Sunflower provides the following reports with the Shipment module:

Shipment and Container Global Information Report

The **Shipment and Container Global Information** report shows detail and summary information of shipments, containers, and container assets. Use this report to display shipment and container details by status, by organization, for a specific date range.

Shipment Manifest Report

The **Shipment Manifest** report provides users with a packing list to include in shipment. The shipment manifest report provides details of the shipment, including from and to information, container details, and asset and stock item information located in the shipped containers.

Shipment and Container Interface Processing Report

The **Shipment and Container Interface Processing Report** displays the results of information migrated into Sunflower through the interface tables and any errors encountered by source load group.